

# ERP Job Aid

RI Enterprise Resource Planning



Create a Requisition Template

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## Requisition Templates:

Requisition Templates are established through the [Create Requisition Template](#) task and are designated to streamline the requisition creation process.

### Template Components:

Fields marked with an asterisk (\*) are required. Templates may include the following elements:

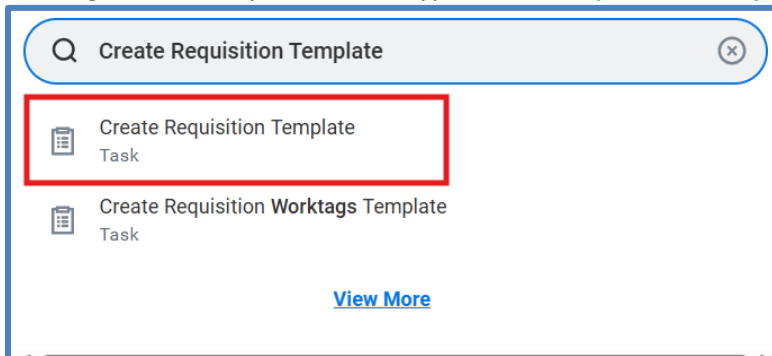
- Company\*: One or more companies must be specified.
- Requisition Type
- Description
- Spend Category
- Supplier
- Order-From Connection
- Worktags\*: Required and may be split across multiple worktags

Requisition templates do not include the following:

- Commodity Code
- Supplier Contract

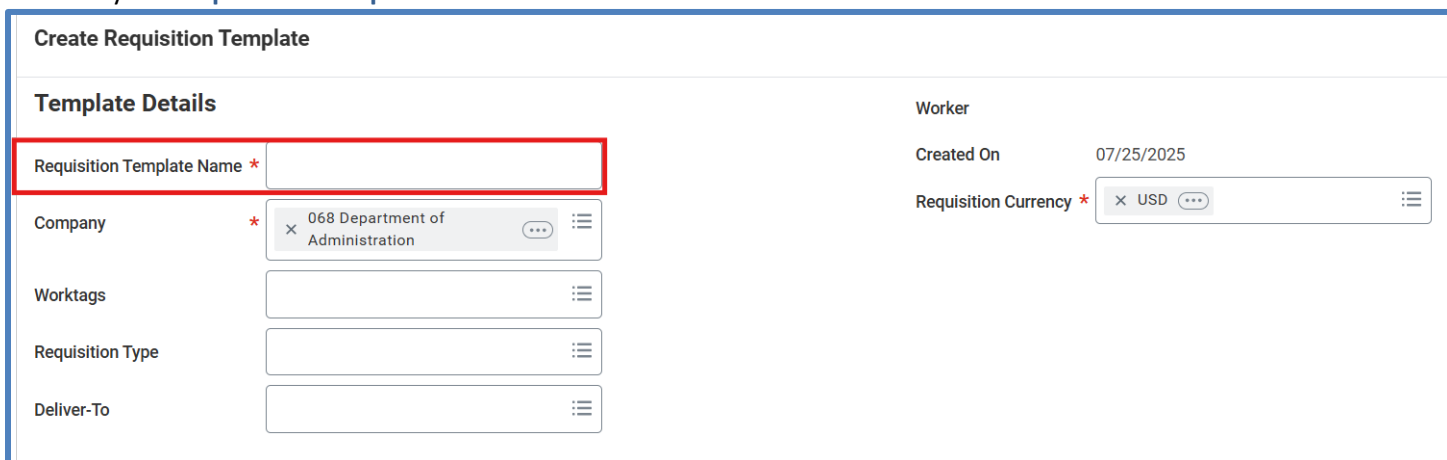
### Create Requisition Template:

1. Using the Workday Search Bar, type [Create Requisition Template](#) and select the task.



A screenshot of the Workday search bar. The search bar contains the text 'Create Requisition Template'. Below the search bar, a list of results is displayed. The first result, 'Create Requisition Template Task', is highlighted with a red rectangular box. The second result, 'Create Requisition Worktags Template Task', is also visible. At the bottom of the list, there is a blue link that says 'View More'.

2. Enter your [Requisition Template Name](#).



A screenshot of the 'Create Requisition Template' form. The form has a title 'Create Requisition Template' at the top. Below the title, there is a section titled 'Template Details'. In this section, the 'Requisition Template Name' field is highlighted with a red rectangular box and has an asterisk (\*) indicating it is required. To the right of this field, there are three other fields: 'Worker', 'Created On' (with the value '07/25/2025'), and 'Requisition Currency' (with the value 'USD' and an asterisk \*). Below the 'Requisition Template Name' field, there are four more fields: 'Company' (with a dropdown menu showing '068 Department of Administration'), 'Worktags', 'Requisition Type', and 'Deliver-To'. Each of these four fields has a dropdown menu icon to its right.

(**Note:** Optionally, enter a Requisition Type.)

3. Enter the details for your [Goods](#) or [Services](#) line items by completing the required fields. Specify an extended amount (e.g., \$1.00) and provide the appropriate Worktags for each split. Select **OK** when done.

(**Note:** An extended amount is required to save the created split lines. This value can be adjusted later during the requisition creation process.)

4. Select the [Menu](#) tab in the top left corner.

5. Under the heading **Organization**, select **Requisitions**.
6. Under the heading **Requisition Details**, select **Edit Details**.
7. When creating a requisition from a template, the following fields must be removed within the Edit Details menu:
  - a. Fund
  - b. Source of Funds
  - c. Additional Worktags
8. Select **Save Changes**.

The screenshot shows the 'Edit Details' menu for requisitions. The menu is organized into two columns. The left column contains the following fields: Fund, Appropriation, Cost Center, Grant, Project Task, Source of Funds, and Additional Worktags. The right column contains three empty input fields, each with a three-line menu icon. The 'Fund' field is highlighted with a red box. The 'Source of Funds' and 'Additional Worktags' fields are also highlighted with a red box. At the bottom of the menu, there are three buttons: 'Save Changes' (highlighted with a red box), 'Cancel', and 'Reset to Default'.

9. Under the heading **Ordering Methods**, select **Add from Templates and Requisitions**.

The screenshot shows the 'Ordering Methods' section. It lists five options, each with an icon and a description:
 

- Search Catalog**: Search the internal catalog of preferred items and suppliers to add into the...
- Request Non-Catalog Items**: Add a good or service that is not in the catalog
- Connect to Supplier Website**: Request goods and services from Supplier Websites
- Add from Templates and Requisitions**: Select from Requisition templates and past Requisitions (highlighted with a red box)
- Select from My Procurement Favorites**: Select from my Favorite items

10. Select the appropriate requisition template by selecting the box under the **Requisition Template** heading.

11. Select **Add to Cart**.

Requisition Templates 1 item	
Select	Name
<input checked="" type="checkbox"/>	Test Template

12. Adjust the **Extended Amount** as applicable.

13. Select **Checkout**.

14. Update additional fields as necessary, including:

- a. Requisition Type
- b. Commodity Code
- c. Supplier
- d. Other relevant fields

15. Upload any required attachments by selecting **Select Files**.

16. Select **Submit** to finalize the requisition.

## Requisition Worktags Template – For Allocations:

### Requisition Worktags Templates:

Requisition Worktags Templates are established through the [Create Requisition Worktags Template](#) task and are designated to streamline the requisition creation process containing split funding.

### Template Components:

Fields marked with an asterisk (\*) are required. Templates may include the following elements:

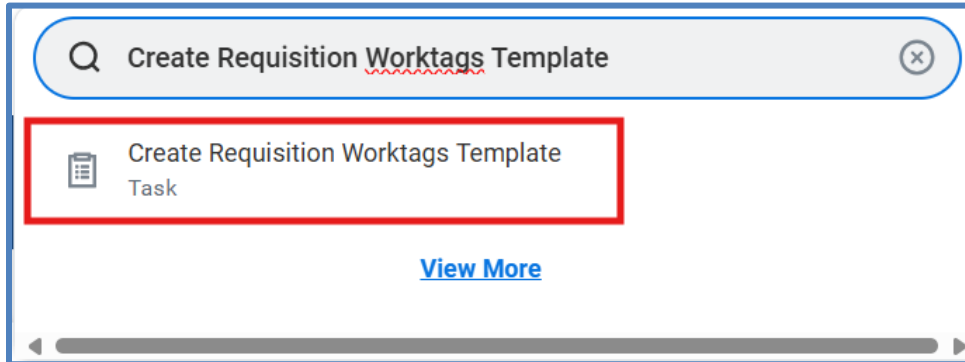
- Company\*: One or more companies must be specified.
- Requisition Type
- Description
- Spend Category
- Supplier
- Order-From Connection
- Worktags\*: Required and may be split across multiple worktags

Requisition Worktags templates do not include the following:

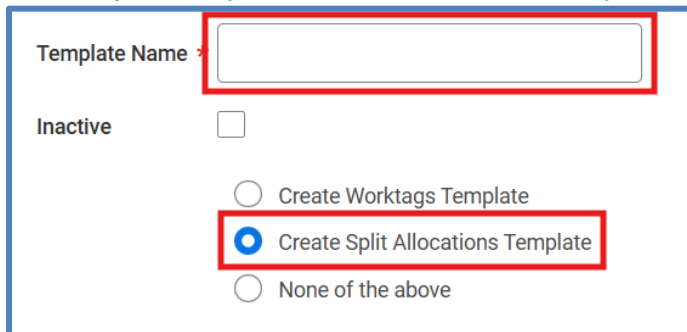
- Commodity Code
- Supplier Contract

## Create Requisition Worktags Template – For Allocations:

1. Using the Workday Search Bar, type [Create Requisition Worktags Template](#) and select the task.

A screenshot of the Workday search bar. The search bar contains the text "Create Requisition Worktags Template". Below the search bar, a red box highlights the search result "Create Requisition Worktags Template" with the subtext "Task". Below the red box, there is a blue link "View More".

2. Enter your [Template Name](#) and select [Create Split Allocations Template](#).

A screenshot of the "Create Requisition Worktags Template" form. The form has a "Template Name" field, which is highlighted with a red box. Below the "Template Name" field, there is an "Inactive" checkbox. Below the "Inactive" checkbox, there are three radio button options: "Create Worktags Template", "Create Split Allocations Template" (which is selected and highlighted with a red box), and "None of the above".

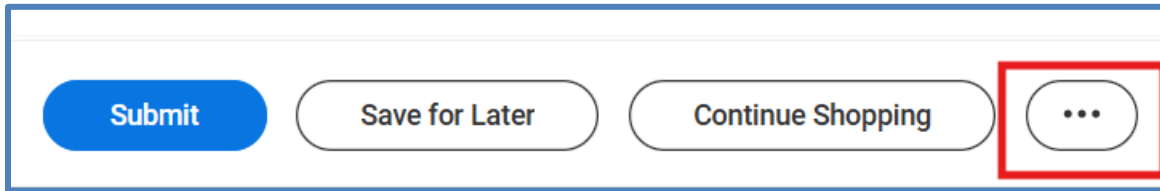
3. The total percentage allocation must equal 100%. An initial line will automatically populate within the template. To add additional lines, select the (+) icon. For each line, ensure you specify the following details:
  - a. Percentage
  - b. Appropriation
  - c. Source of Funds

- d. Any applicable additional Worktags
4. Select **OK** when done.
5. Select the **Menu** tab in the top left corner.
6. Under the heading **Organization**, select **Requisitions**.
7. Under the heading **Requisition Details**, select **Edit Details**.
8. When creating a requisition from a template, the following fields must be removed within the Edit Details menu:
  - a. Fund
  - b. Source of Funds
  - c. Additional Worktags
9. Select **Save Changes**.

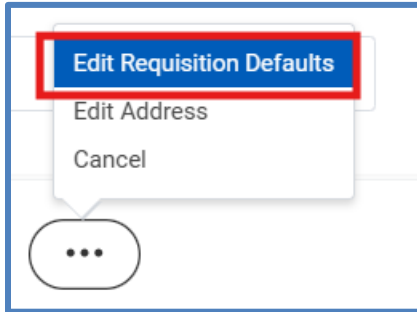
10. Under the heading **Ordering Methods**, select **Request Non-Catalog Items**.

11. Proceed by entering your requisition details.

12. Select **Add to Cart**.
13. Select **Checkout**.
14. Select the related actions (...) at the bottom of the screen.



15. Select **Edit Requisition Defaults**.



16. Select **Copy From Worktags Template**.
17. Select **Split Allocations** then select your template.
18. Select **Apply**.
19. To verify that the template has been successfully applied, navigate to the Goods/Services line. Use the horizontal scroll bar to locate the Splits field.
20. Select the Splits hyperlink to view the split.
21. Select Done.
22. Complete any other required requisition details and select **Submit** to finalize the requisition.